



Expert Insights

# An innovative approach to digital collaboration

Defining policy at the speed of relevance

IBM Institute for Business Value



## Experts on this topic



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Today's reality demands policy that reflects a wide range of perspectives, developed at the speed of relevance.

## Key takeaways

### Beyond social media

Today's unique challenges require decisiveness, but also collaboration at a scale and speed greater than ever before, on a platform that supports real conversation, exploration, discourse and, most critically, progress toward an objective.

### Building a better foundation

The platform must be secure, scalable, support the right balance between structure and freedom, and use artificial intelligence to surface insights.

### Creating the right culture

A collaborative approach requires the right culture and event experience—and the right leadership, one prone to listen and build rather than criticize and reject.

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## Interesting times demand a better way to decide

Nothing about “policy” sounds inclusive, innovative or quick—especially the process of creating it. Just saying the word conjures up images of ponderous meetings behind closed doors led by powerful officials, executives, or administrators plodding along at the “speed of consensus.” Trying to open up the process and include a wide range of diverse perspectives, then, would seem a painful elongation of an already laborious chore.

But today's reality demands just that: policy that reflects a wide range of perspectives, and that's developed at the speed of relevance.

And not just policy making. The realities of a new age of risk require a decision-making process that is more responsive, inclusive and data-informed than what many organizations are used to.<sup>1</sup> And the changes organizations must make to adapt to an environment of greater risk require open innovation and broad collaboration.

COVID isn't the only reason risk and uncertainty have become commonplace. A host of other thorny issues demand new comprehensive policy and decision-making approaches: severe environmental disruption and challenges due to climate change; a quest for sustainability in its fullest sense, including reducing social inequality; and finding new ways to quell political and economic instability, to name just a few.

The COVID pandemic has revealed the brittleness of policy-setting and decision-making based on in-person meetings. While resourceful teams around the world quickly put existing technology to work—videoconferencing, in particular—the technologies are proving ill-suited for discussing and creating new approaches, exploring conflicting views, and creating policy changes to address new realities.

Not only are they severely scale- and feature-limited, they do not support the kind of rich, cumulative, productive conversations necessary for dealing with serious, complex, and often volatile issues. Meanwhile, the urgency and necessity to develop policies and strategies to respond to the COVID-19 pandemic and recent social unrest sparked by protests over racial discrimination and injustice is increasing.

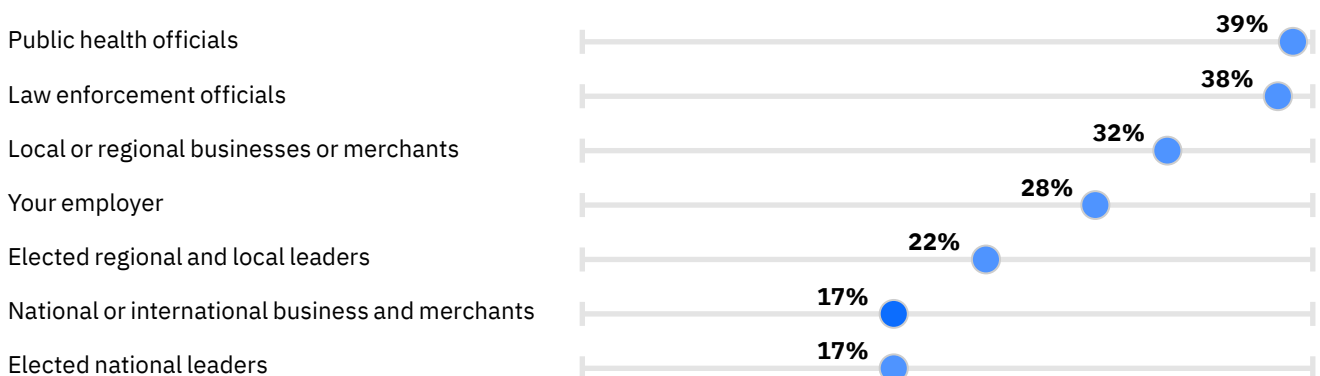
How can organizations respond to the ongoing challenges of new risk and become more resilient, adaptable, agile, and responsive? Practically speaking, how can they adjust and refine their business strategies, operating models, and workflows rapidly, but keep them informed by a wide range of insights and perspectives?

Doing so requires decisiveness, but also collaboration at a scale and speed greater than ever before—two requirements that can be at odds. In addition, an approach and supporting technology platform must enable trust in both the decisions that are made and how they were made, particularly challenging when confidence in institutions, governments, and many leaders is declining.

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### Figure 1

To what extent do you trust the following parties?



Source: IBM Institute for Business Value Market Insights. Survey of 2,524 US adults. August 2020.

Trust is an increasingly important issue that organizations must face head on. While there were some indications that general trust levels in institutions may have been increasing at the beginning of the pandemic, research indicates that large trust gains are often quickly lost.<sup>2</sup> In the midst of a global pandemic, most do not believe governments or businesses are doing a good job of keeping them safe. In the US—the epicenter of the COVID-19 pandemic—trust levels in various parties is very low. Less than 40 percent of respondents trust public health officials and only 17 percent trust elected national leaders (see Figure 1).

Just as critical, the approach to policy creation and decision making must be useful while a situation is still evolving, not after years of study when the problem will have morphed into a different challenge. This increased tempo requires even faster-paced development of plans, alternatives and courses of action. Taken with the need to accommodate—and encourage—a diverse set of perspectives, moving at the speed of relevance has thus far proved an elusive goal.

Digital technology can help, but it is only part of the solution. In our experience, how technology is applied is just as, if not more, important.

Over a decade ago we began experimenting with a new platform to support large scale conversations and innovation across a global employee population. By continually iterating both the technology platform and the process that surrounds it, we've been able to apply what we've learned, improve the overall approach, and arrive at a method we believe could have much wider applicability in meeting today's need for better policy and decision making.

We call it an "InnovationJam®."

## More than a conversation: a way to build

We live in the era of talking at scale. Billions of people send trillions of texts messages each year. Over 300 million tweet their opinions, approval—or perhaps more often, rabid disapproval—of events, companies, government actions, government inaction, purchases, customer service fiascos, pet peeves and pet shenanigans. Of the billion Instagram users, 500 million share images daily, and 800 million TikTok users do the same with videos. Not to mention the nearly 2.5 billion active FaceBook users each month.<sup>3</sup>

But rarely are there real, productive conversations. There are shouting matches, flame wars, to be sure, and attempts at civil dialogue. But social media has not proved to be the boon to public discourse many originally thought it would be. Participants tend to preach to the choir or talk at others, not converse with them.

Unlike social media and other communications platforms, what's needed is a platform that supports real conversation, exploration, discourse and, most critically, progress toward an objective.

An InnovationJam serves as an instructive model, and much of what we've learned conducting them is applicable to policy and decision making today. A Jam is an event held over two to three days with an organizational focus on and support for broad participation. While dependent on the size of the organization holding it, most Jams involve tens of thousands of active participants. The largest have had over 200,000 participants, with up to 45,000 of them concurrent. The platform has been successfully tested up to 1 million users per minute.

First launched almost 20 years ago, Jams have focused on business issues ranging from who we are and what we value most as a company, to how to bring those values to life in our everyday practice, to ideas for new businesses based on cutting edge research from our labs, to how to create the ultimate experience for clients. Jams have acted as a catalyst for culture change within our company, while the platform itself has undergone regular iterative innovation.

We've made the Jam experience available to clients collaborating with us and for other organizations to use with their own communities. After the two or three days of the actual Jam event, initial results are available in 48 hours, and comprehensive analytics within three weeks.

From the many Jams we've conducted, we've learned that the platform must be secure, able to scale quickly, support the right balance between conversational structure and freedom, and be launched in the right context and with the right initial set of questions.

First, security. Opinion leaders, subject matter experts, and general participants won't gather together at scale and openly contribute, exchange points of view and ideas, and candidly engage with one another unless they have full confidence the conversation is safe. The dialogue must not be hijacked, nor personal information and comments misappropriated. The Jam platform accomplishes this by running in the same hybrid cloud trusted to run the web presence of The Masters Tournament, Wimbledon, and the US Open.

Next, given the typical number of participants and the exponential growth of comments, the platform has to be able to scale with no degradation in the user experience: scrolling through comments, adding ideas, searching for similar threads or previous contributions, building and managing one's personal network in the event, among other capabilities. The Jam platform meets this need by being entirely hybrid cloud-based and utilizes multiple datacenter redundancy so the Jam application can be available 24x7.

A typical Jam offers three to five primary discussion areas—the big questions or issues participants are invited to explore. Each discussion area has several sub-sections based on aspects of the key issue. Within each sub-section, though, participants can launch new threads and contribute to existing ones, with no predetermined limit on thread number or length.

As in any productive conversation, context is critical, especially if the Jam is convening many different, even potentially conflicting, viewpoints and perspectives. The Jam platform supports this by providing space for an overview of the key issues, opening statements by moderators who each take responsibility for a discussion area, and with a host of pre-event communications designed to whet appetites and give all who are participating a common starting point.

With a common starting point and the right context, Jam conversations take off quickly. So fast, in fact, that it creates a huge challenge for anyone trying to keep up with what's going on.

## Insight: Transatlantic Security Policy Jam

In early 2020, 2800 people from across the world collaborated for 50 hours, generating over 4000 perspectives—nearly half a million words—on a range of important security topics. The organizers agreed that the volume and intensity of the Jam's intellectual horsepower could not have been generated in any other way.

Organized as all-volunteer effort by the Armed Forces Communication and Electronics Association (AFCEA), IBM and the Partnership for Peace Consortium of Defense Academies and Security Studies Institutes, the Jam targeted an audience of NGOs, government employees, military leaders, academia and private sector participants. Its six thematic forums were hosted by leading think tanks and defense educational institutions in North America, Europe and Asia.

AI working together with human facilitators enabled objective and subjective conclusions to be merged and validated in real time, enabling the best ideas, analysis, and recommendations to emerge. Appropriately for a discussion of security in the era of COVID-19, most posts were made by participants who had rarely worked from home before it struck.

The Jam yielded eleven primary themes, such as "International Order: Will the Covid-19 Pandemic Turn into a Systemic Shock?" and "Artificial Intelligence – Cooperation Opportunities or the New Battleground?" For each theme, post-Jam analysis produced a set of recommended actions for policy makers. Five overarching observations also emerged, ranging from fake news and disinformation making the pandemic an "infodemic," to the dangers to security from an increased tension between globalism and nationalism, to climate change as a significant issue for any pandemic solution.

The development of a conversation must build, gain momentum, explore options, and make proposals for action.

## Making sense of all the voices

Making sense of thousands of comments across thousands of threads seems close to impossible—for participants, as well as anyone trying to extract insights, ideas and conclusions from a Jam. It's physically impossible in the limited event time to read, consider and respond to all the comments made. But a suite of advanced analytics and artificial intelligence tools running in parallel with the conversation does the heavy lifting of sense-making, extracting insights from the content and helping to synthesize possible outcomes after the conversation concludes.

For participants, for example, this means having a dashboard that shows at a glance the responses to comments they've made. The Jam also allows them to follow specific participants, see what's new, and quickly scan other conversation summaries and updates designed to help the conversation progress, instead of bogging down in repetitive cycles. A strong search functionality also makes it easier to find specific comments or read and respond to threads focused on a particular content area.

But just finding interesting tidbits or reactions to a post you've made, while nice, doesn't really accomplish the goal of a Jam, especially if viewed as a platform for developing policy. The development of a conversation over time must build, gain momentum, explore options, and make proposals for action. Enabling—and encouraging—a large-scale conversation to build to conclusions, proposals, or ideas that can be evaluated first requires the technology to decipher what's actually happening in a conversation thread, and then the ability to surface moments of insight, idea development, and progress.

## Insight: COVID-19—IBM's Jam for returning to the workplace

As the early spikes of COVID-19 began to be flattened, companies around the world began to grapple with how exactly to bring a workforce that had so suddenly been displaced to remote, distributed locations—most often, homes—back into the office. Obviously, some of the decisions they made were dictated by government regulations and specific guidance from healthcare officials. Protecting the health of returning employees was the primary concern. IBM, for instance, developed a “Return to the Workplace” playbook that detailed phasing criteria and new health and safety norms.<sup>4</sup>

But what about how employees would function in this new environment? What new collective habits would emerge—better yet, could be encouraged in support of the company's values and business needs? What had employees learned during their stint of enforced remote work that might enable to company to be more resilient, agile and productive in the future? And how could the company's evolving policies reflect that accumulated knowledge?

To help navigate the transition back to the office, IBM held a two-day “Think Forward” Jam and invited employees to “an opportunity for a disruptive reset—a holistic exploration of how we work.” Covering four primary areas of work—engaging with clients; delivering value to clients; innovating; and continuing to develop new ways of working and leading—almost 40,000 IBMers discussed the future state they wanted for the company.

Ideas ranged from gamifying innovation, to the need for speed over perfection, to its balancing counterpart: the need for patience, to think, slow down, focus on the person in front of you—intently—and make connections. In line with the pre-Jam commitments of its sponsors, the outputs of the Jam helped IBM's leadership shape its strategy for how IBMers would work during the crisis and beyond it.

Technology is only part of the picture. Unfortunately, it's the one almost everyone fixates on.

The Jam platform does this by employing a suite of advanced unstructured text analytics tools. The suite includes natural language processing (NLP), linguistic analytics to infer individual personality characteristics, and language generation to create summaries from a variety of data sources (see Figure 2). Advanced sentiment analysis also helps understand idioms and more, and advanced topic clustering analyzes and creates meaningful topics from the data.

The Jam platform experienced a huge leap in this capability when it integrated a new AI breakthrough: The ability to recognize the elements of an argument—evidence, proof, rhetorical reasoning—and infer whether a statement is in support of or opposition to an assertion. This capability makes it much easier to make sense of hundreds of thousands of comments. Is a comment asserting the basics of an argument for or against something? Agreeing with, or supporting, a proposed line of reasoning? Or providing a counter argument to something in discussion?

Finally, this same range of analytics and AI must be applied to the Jam's final output: often hundreds of thousands, even millions of words, or the equivalent of dozens of books generated within 48-52 hours. This analysis typically surfaces themes and aggregates comments supporting them, making it easier for anyone doing post-Jam research to follow a thread of conversation around a particular idea. It also helps convey a sense of what the most popular topics and ideas were, without losing sight of outliers, which can often be a source of innovative approaches.

But a critical thing we've learned about large-scale collaborations: technology is only part of the picture. Unfortunately, it's the one almost everyone fixates on.

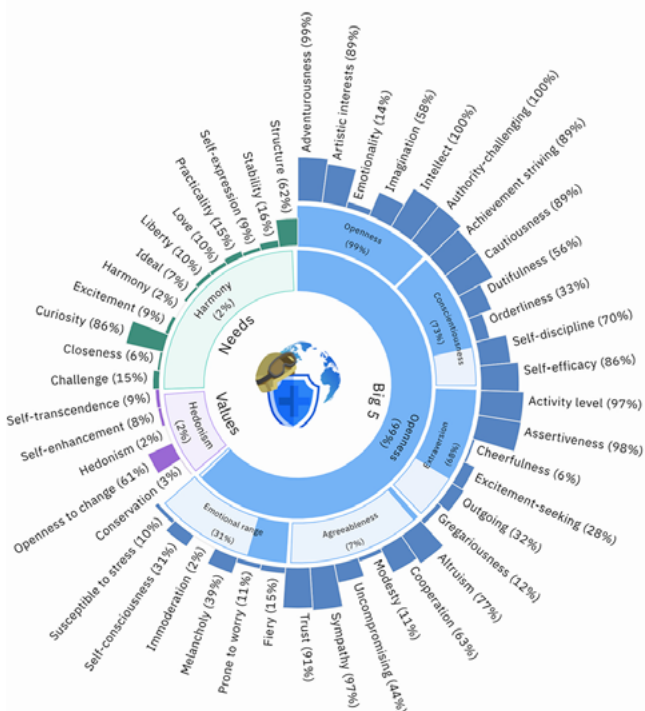
## Jam culture

A truly social experience that is transparent and can be trusted demands the right collaborative culture and event experience—and the right leadership. Organizations that have worked hard to cultivate a culture of open innovation, where ideas are welcome and the kneejerk reaction to something new is not to criticize but to welcome, evaluate, and if possible, build on it, will fare much better in using a Jam-like approach.

Certainly, establishing Jam ground rules helps. Participants need to know they can be open without fear of retaliation, but also accept that their contributions must be respectful of others, and that there are clear consequences for refusing to do so. These guidelines work best if the day-to-day practice of the organization has been consistent with them, and if the organization's leaders are known to welcome candid comments and suggestions.

Active leadership participation in Jam conversations helps. Not "drive-by statement drops," but real engagement with Jam participants by the organization's leaders. Often, key leaders from parts of the organization closest to the Jam's primary discussion areas serve as moderators, with teams of facilitators who assist in sparking extended conversation, summarizing and aggregating ideas, and generally pushing the conversations forward.

**Figure 2**  
Assessing a Jam's "personality"  
**Analysis from Transatlantic Security Policy Jam**





A special case of Jam leaders are, for lack of a better phrase, the VIPs. In every field of endeavor or inquiry, there are leading thinkers, provocateurs and recognized names. Including some of them visibly in the Jam—and making their participation known prior to it—will generate excitement and increase participation. While their time may be limited, good planning and advance preparation can make the most of the time they can spare.

It's essential that leaders set the right expectations for participants prior to the Jam, and follow through in a way that fulfills those expectations. They can make clear the Jam event is a high priority, strongly encourage—but not coerce—participation, and, in the case of corporate Jams, back that up by making sure employees have explicit permission to spend time in the event as part of their work.

But just as important is the stated purpose of the Jam: what are we discussing, why, and to what end—what will the end result be of all this time and all these conversations? Participants convinced their time and intellectual contributions will result in a tangible product—a new set of proposed policies; ten new business areas for investment; recommendations for innovation and improvements in an organization's operations—will be far more motivated than if they were just invited to a digital talkfest.

Above all, this demands genuine transparency from leaders before, during and after a Jam. Providing clear, honest answers to why we are doing this, what we hope to accomplish, conducting candid conversations during the Jam that don't gloss over sensitive issues at the heart of the issues being discussed, and laying out a transparent process for arriving at the desired Jam output all make possible real engagement and commitment, not just to the Jam itself, but to the decisions taken as a result.

In some ways, the Jam is an embodiment of the principle “what you do is important, but how you do it matters just as much.” A diverse, large-scale collaboration can deliver a powerful mandate for change, as well as drastically improve the quality and efficacy of the decisions, policies, and progress inherent in that change.

## Insight: Change Direction Jam, a global conversation on mental health culture change<sup>5</sup>

Mental health was already a global issue in need of new ideas, policies and solutions. And then COVID-19 hit, further exacerbating what is, to many, a crisis. The Change Direction Jam preceded the pandemic but offered important insights and suggestions for action. For 32 consecutive hours, military personnel, entertainment executives, mental health professionals, and many others from around the world shared thoughts and ideas about how to address the stigma attached to mental illness, promote mental health practices and suicide prevention, and curb the spread of substance use disorder.

A noteworthy feature of this particular Jam was the protected, trusted, secure space it created for participants to be candid. Nearly 1,000 participants worldwide posted their ideas and stories about struggles with depression, anxiety, trauma, suicide, and substance abuse. The volume and detail of the personal stories shared was staggering, as was the scope of discussion. Participants felt comfortable posting their personal experiences, in addition to suggestions for improvement.

The Jam focused on five topics: Education and suicide prevention; Cultural and access barriers; Trauma; Work environment; and Policy. The most active topic was Education and suicide prevention. The highest rated post from the Jam dealt with suicide among veterans, particularly as they return home and reintegrate into society. The conclusion from Jam participants: preventing suicide is dependent on overcoming the stigma of mental illness.

They also felt making treatment options more visible and providing more education to the public were next steps that social media can help with—connecting individuals with online support groups and therapists, for example. Participants also shared ways they felt companies could better support policies and practices that promoted emotional health and well-being. The most active conversation on this subject—and fourth most active in the Jam—discussed the role of business leaders in creating a happier and more engaging work environment.

The Change Direction Jam offered important insights and suggestions for action and fostered more openness about mental health—all of which is critical to rapidly expand available services to those in need.

## Action guide

### *Defining policy at the speed of relevance*

The nature of today's issues requires collaboration at scale and pace. How should you approach using a large-scale digital collaboration to address them?

#### **1. Determine your intent.**

What are you really trying to accomplish? What do you hope to learn? Are you open to new thinking and ideas that may challenge your assumptions and current thinking? Are you seeking a mandate for change? Or are you primarily seeking validation for something already set in motion? How quickly do you need to advance the discussion and take concrete action?

#### **2. Determine the best approach.**

The brainstorming process and the technology that can support it matter. Jams are not a rubber stamp. By nature, they are exploratory. They rarely yield perfectly finished proposals but are good at providing all the ideas and insight necessary to construct them.

Consider the alternative to a large-scale digital intervention: do you have the time to wait for the freedom to travel and physically be together for a few days to brainstorm? How broad a net for participants are you casting? Are your prospective participants already taking to social media to discuss the issues in a way that rarely advances discussion? Or can you provide them a facilitated platform to harness their creativity and energy?

#### **3. Cultivate a culture of open, candid collaboration.**

Technology, by itself, cannot invent a new culture. It can, though, amplify what exists or help encourage a leader-supported transition to a better one. If you haven't already, take steps now to encourage a frank and respectful exchange of ideas in your organization, making sure that leaders demonstrate it in word and, more importantly, deed.

#### **4. Reach beyond the usual suspects and broaden the conversation.**

As you explore the issue you want to collaborate on, make sure you are really being inclusive—do you have the right mix in the digital space to represent all perspectives? Are you benefiting from the wisdom in sometimes conflicting views? And can you convene the right participants for a productive, not incendiary, conversation?

#### **5. Determine what you will do with the output.**

Jams work best when participants know in advance what their efforts will lead to. And the success of future collaborations rests on them actually seeing those promised results occur. As you develop your approach to the issue at hand, explore what practical things you can promise—and deliver. In some ways the Jam is only the beginning of a conversation, and more importantly, an ongoing relationship for progress.

## About Expert Insights

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## Notes and sources

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Produced in the United States of America  
September 2020

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